



# Social Media Marketing Strategies

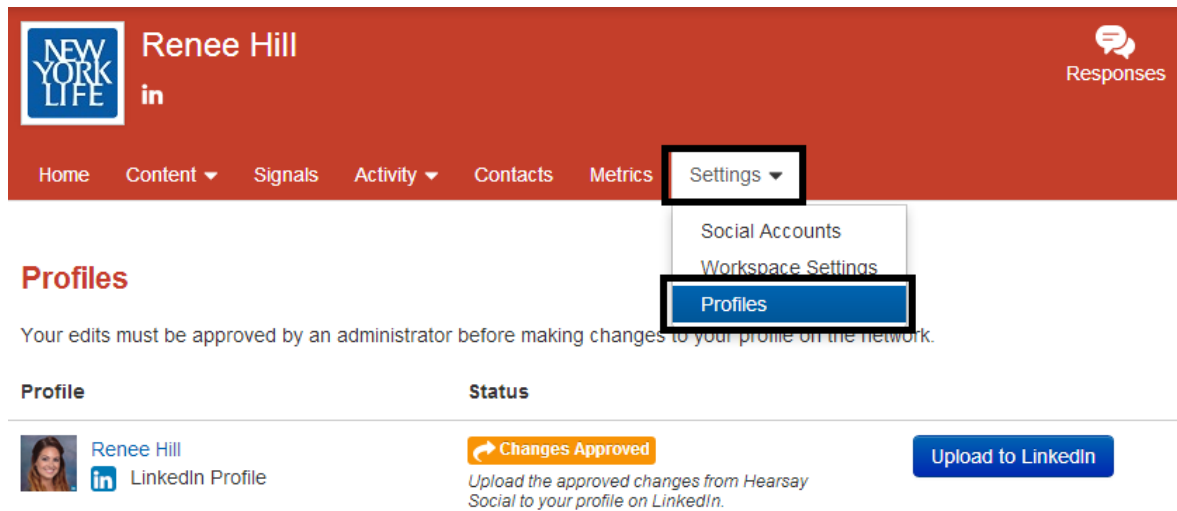
Use this guide as a resource to get started with social and begin building your network.

**PRE-REQUISITE - Ensure Facebook and LinkedIn Pages are connected to Hearsay and APPROVED.**

(Log into Hearsay → Settings Tab → Profiles to CHECK)

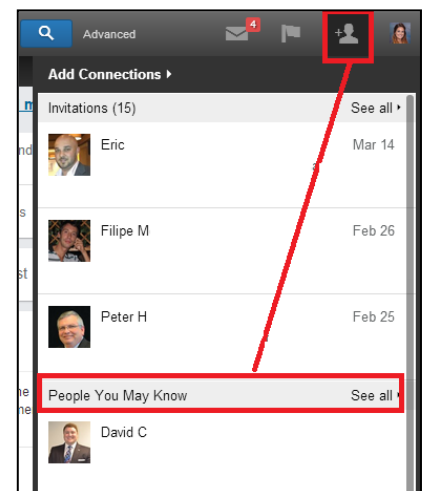
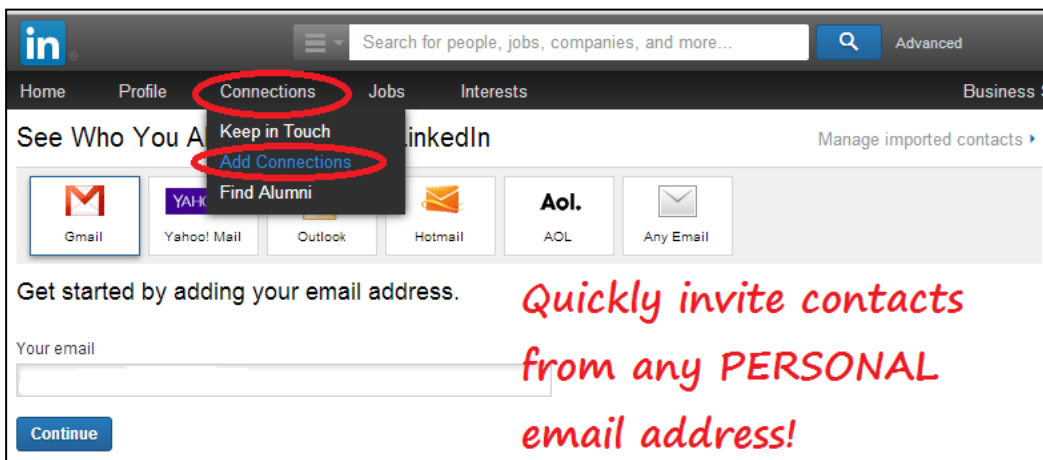
Yes ✓ Approved and Up To Date

No – If you don't see the green checkmark – you still have work to do!



## Maximize your existing contacts on LinkedIn

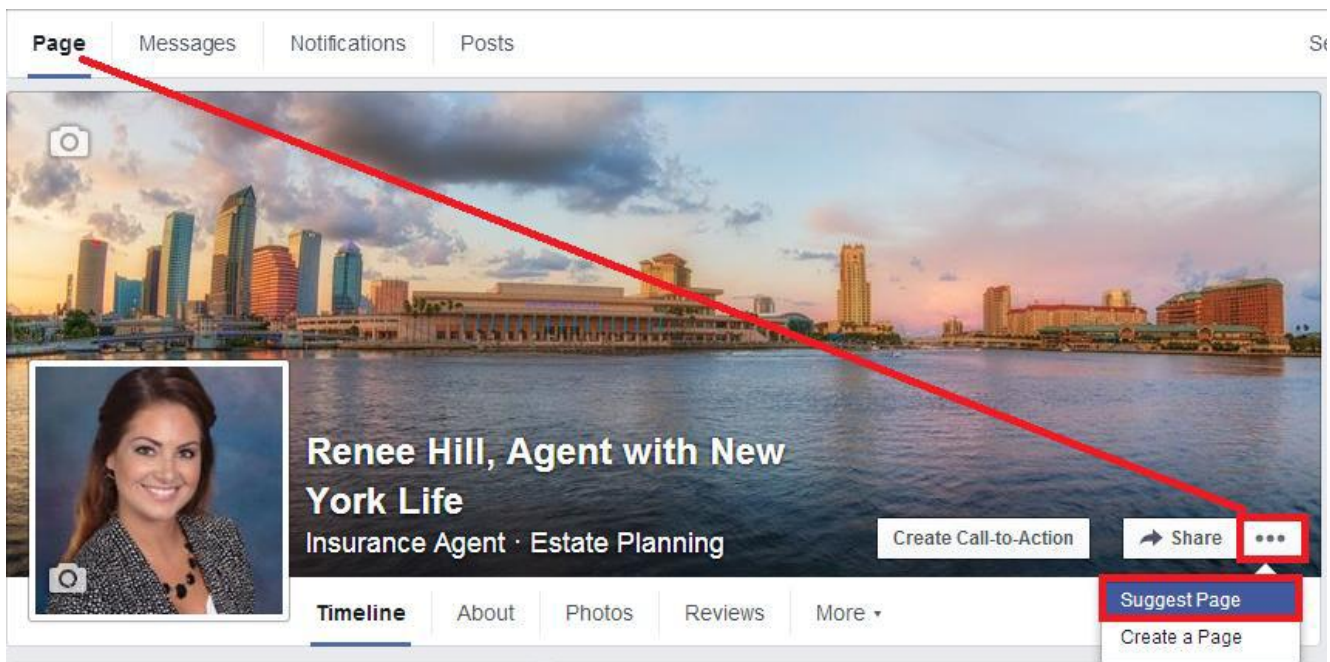
- Search & Connect with **Project200 Spreadsheet Contacts on LinkedIn**
- Use the tool to **Upload your Personal Email Contacts**
- Search & Connect with **“Paper Prospects” – business cards & other written lists**
- Review **“People you May Know”** to find connections
- Connect with **CLIENTS and prospects for UPCOMING/RECENT APPOINTMENTS**
- Download the **LinkedIn App to Sync your phone contacts**
- Put your **LinkedIn URL in your Outlook Email Signature**



## Promote your Facebook Business Page

- “Invite Friends”** using the tool under “Build Audience”
- Upload Email Contacts** under “Suggest Page”
- Share a Status Update on your PERSONAL timeline** to promote your business page
- Put your **Facebook URL in your Outlook Email Signature**
- Private Message your **10 closest friends/relatives** and ask them to **SHARE** your page
- \*\*Boost your Posts\*\*** - For \$5 you can “boost” a post and increase your page visibility

Screenshot to “Suggest Page” and upload email contacts. Language Examples below



### **Share an update on YOUR Facebook Timeline:**

*"Hey everyone! I've created a Facebook Business Page to help stay more closely connected to my clients and friends. You'll find great articles, business updates and other posts I think you'll really enjoy. I'm working to grow my page and I'd appreciate your "like"! Check out my page here": (LINK TO PAGE)*

### **Example update your friends can post:**

*"My (Friend/Relative) (Agent Name) has a business page where he/she shares great articles, helpful financial tips and other fun posts I think you'll really enjoy. He/She is working to grow their page and would appreciate your "like"! Will you help? Check out his/her page here: (LINK TO PAGE)"! Thanks!*

### **Ask for help! PRIVATE MESSAGE:**

*"Hi (NAME)- I've created a Facebook Business Page to help stay more closely connected to my clients and friends. You'll find great articles, business updates and other posts I think you'll really enjoy. I'm working to grow my page and I'd appreciate your help! Would you mind sharing my page as an update? I'd really appreciate it! I've even included an update below with a link to my page that you could copy and paste if you'd like! Thanks so much!*

**You've started building a social network, now what? Use the strategies below to mine your contacts and leverage your network!**

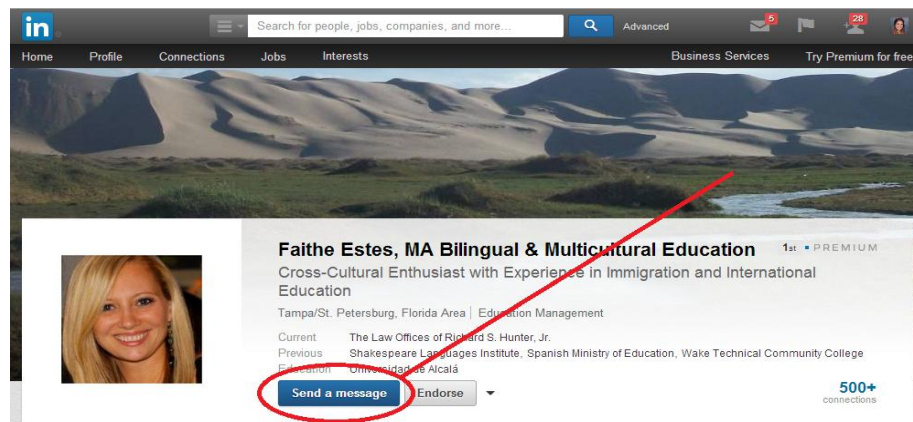
## **Strategy 1 - "Let's Catch Up"**

**Purpose:** Revive dormant social relationships by inviting to catch up OFFLINE.

**Dormant Message Example:** "...Hi (NAME), I hope you're well. It's been a while! I'd love to find a time to grab a cup of coffee in the next week or so to catch up. **How does next Thursday afternoon at 5:30 look? I'm interested in learning more about your position as (ROLE/TITLE). Let me know what your schedule looks like. Looking forward to it! - YOUR NAME**"

**Endorsement Response Message Example:** "...Hi NAME. I wanted to send a quick note to thank you for the endorsements. Social Media plays an important role in my practice, so I truly appreciate it! It's been a while - I'd love to find a time to grab a cup of coffee in the next week or so to catch up. **How does next Thursday afternoon at 5:30 look? I'm interested in learning more about your position as (ROLE/TITLE). Let me know what your schedule looks like. Looking forward to it! - YOUR NAME**"

### **Ex: Sending a New Private Message in LinkedIn**



## **Strategy 2 - Get Introduced! Asking for Social Introductions**

**On Appointments:** Connect to prospects and clients socially *before* appts (preferably on LinkedIn) to conduct keyword search and create a strategic introduction list. Bring list to appt to request introductions on 2<sup>nd</sup> appt or policy delivery. **"(CLIENT) I was planning on reaching out to personally introduce myself to a few people that you happen to be connected to on LinkedIn. I'd appreciate your insights, is there anyone on this list that I SHOULDN'T call?"**

**Online:** Create your own social "keyword list" to continuously reference for 2<sup>nd</sup> degree searches. Ask for personal introductions via private message, phone call or LinkedIn "Get Introduced" feature.

**General keywords:** Owner, Teacher, Human Resources, President, CFO, Medical, Attorney  
**Commonality Based Keywords:** Hobbies, Interests, University, Previous Employer, Zip Code

**Language Example:** **(CLIENT), I see you're connected to (PROSPECT) on LinkedIn. I'm not sure how you know (him/her), but based on (his/her) role as (TITLE/ROLE)- I think I could be of help to(him/her) in what I do. Would you be open to introducing me? (By the way, if you're not comfortable, I completely understand) Thanks! - YOUR NAME**

**Pivot if Not a good Prospect:** **"No problem at all. Like I said, I'm looking to grow my business in the (X) Market/Geography, so do you know anyone you COULD introduce me to?"**

## Strategy 3- Congratulations! Responding to Social Signals

**Step 1: Review Social Signals to “dismiss”** signals originating from social connections/friends who reside in states where you are NOT licensed, are minors, and social signals that you know to be inaccurate.

**Step 2:** Expand each remaining Social Signal to review the content. **Mark appropriate signals for “Follow Up”.** Open LinkedIn and Facebook to Prepare to Respond.

**Step 3:** Review your “Follow Up” section under the Social Signals tab. **Respond via PRIVATE MESSAGE** using the tactics and language below for each type of Social Signal: New Home, New Baby, New Job, Engagement, Marriage, Birthday and Graduation. Congratulate – and **ask a RELEVANT Question! Engage in conversation before you ask for an offline GET TOGETHER.**

### Private Message Examples & Relevant Questions

*Congratulations (Name)! That’s great news! ... (Continue with question below)*

**New Baby:** How’s the family doing?

**Graduation:** Does he/she have college plans?

(College) Does he/she have a job lined up?

(Primary) Is he/she excited for (middle/elementary/high) school?

**New Home 1:** *How did you choose the neighborhood?*

**New Home 2:** *Did you use a Realtor?*

**New Job:** *What led to the change?*

**New Promotion:** *Are you still in the same department? Or is it a completely new role?*

**Engagement 1:** *How did the two of you meet? (if relationship is cool)*

**Marriage:** *Any exciting honeymoon plans?*

**\*Birthday 1:** *(Happy Birthday!) Do you have any fun plans to celebrate?*



**Step 4:** If you get a reply – ask for an **OFFLINE CATCH UP**. If there is no response – move onto the next signal!

**Offline Message Request:** *Thanks for the update! I can’t believe it’s been so long – I’d love to get together and grab a coffee in the next few weeks so that I can hear more about your new (LIFE EVENT) and we can properly catch up! Let me know what works best for you! (YOUR NAME)*

**Tip:** During the “catch up” – continue to ask about other life changes or updates to pivot the conversation, or use the information for follow up. They will naturally ask...what do YOU do?

#### **In Person Pivots:**

**General Pivot Language:** *“I’m sure you’ve noticed I’m with New York Life – you may not know that I specialize in working with (YF, SBO, Retirees, Pre Ret) during periods of transition, to help make sure that their financial goals for their (Family, Business, Self) stay on track. With your new (LIFE EVENT) I’d love the opportunity to review your plans to see if I could be a resource to your (family/self/company). If I could recommend a solution that added value, and made economic sense to your (family/business/self), would you like to see the options?”*

**New Baby/Grad:** *“By the way – I’ve got a great (new baby/grad) gift! (Talk about WL Gifting)*

**New Home:** *“By the way – Did you know that I can help with Mortgage Protection?”*

**New Job:** *“Do you know if you left your Life Insurance benefits or 401k behind at your last job?”*

**Birthday:** *Speaking of the year ahead, I’d be happy to do a complementary review & give you a LifeFolio!*